To start this process, please ensure the following:

❑ You are an Active AusCycling Member and currently a Committee Member of your Club.

❑ Your Club has been given access to your Club's TidyHQ account.
   To do this, please see below:

1. Have a Committee Member of your Club log into your Club's TidyHQ.
2. Go to '**Admins & Roles**' which will be on the left-hand side of their Club's Dashboard login.
3. In the right-hand corner of their screen, there is a button '**+Invite Admin**'. Click on this and have them enter your Email Address and provide the '**Permissions**' that you require. Note: For this report, you will require access to '**Contacts**'.
4. Click on '**Invite**' at the bottom and an email will be sent to the email address.
5. Check your email inbox and you should receive this email.
6. In the email, there will be a link for your Club, like the image to the right highlighted. **>**
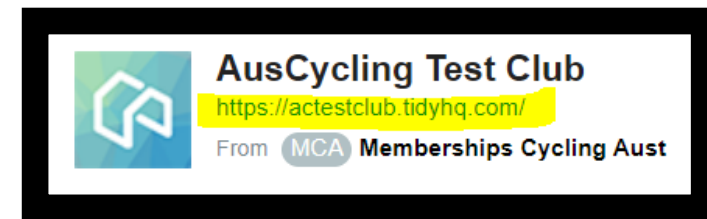

HOT TIP:

Save this URL link to your '**Favourites**' within your internet browser for easy access.
A password may be required to be created or you may be able to use your password already used under TidyHQ.

This covers the requirements needed to start your **Current Members of your Club Report**.

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Please follow the steps below to access your Report:

1. Go to your Club's Link and login. If you have any troubles logging in, you can click on '**Forgotten Password**' or you can contact the AusCycling Member Services Team.

2. When you have logged in to your Club's TidyHQ, you will first arrive at the '**Dashboard**' of your Club.

3. Hover your mouse icon over the word 'Contacts' on the left-hand side of your screen and select '**Groups**'. Screenshot below shows the option to select:
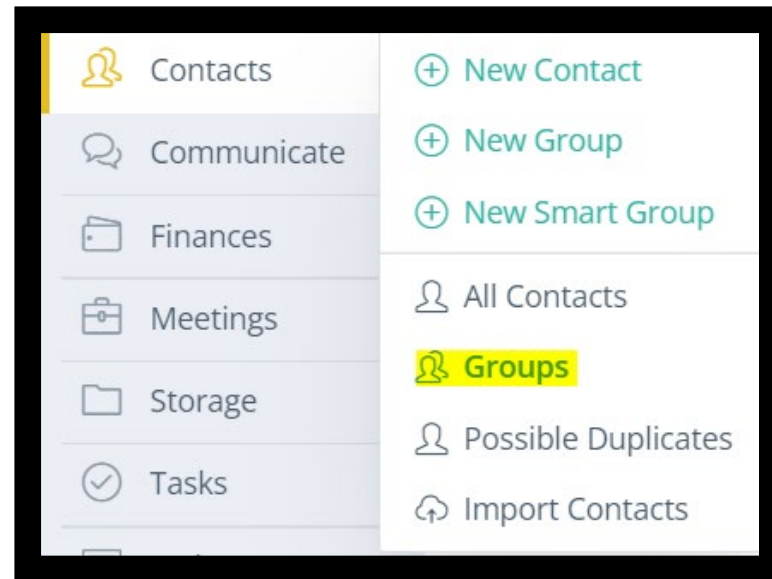
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4. This will take you to your Club's Groups. The '**Managed**' groups have been created with both AusCycling/TidyHQ Teams to assist Club Committees with reporting.
Screenshot below shows an example of the '**Managed**' groups that have been created:
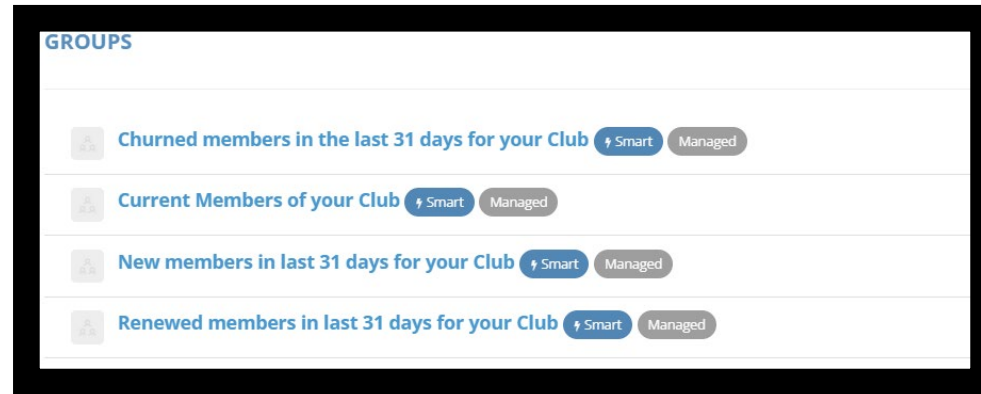
5. Click on '**Current Members of your Club**' (Smart + Managed). This will take you to smart group.
HOT TIP:
Before your next step:
Go to '**Actions**' on your screen and select '**Refresh Smart Group**'. This will refresh your group with the accurate information (normally takes 2-3 minutes) and then you can refresh your page.
To check if this has refreshed and up to date, you will see the below:
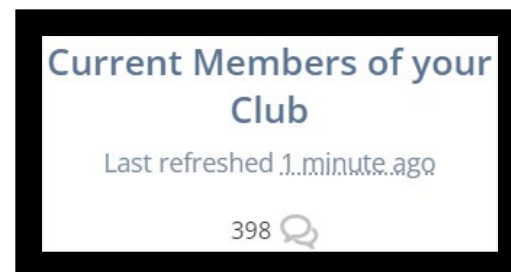
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6. Your Club's group should now be updated. Now, click on icon '**Displayed Fields**' – this looks like:

7. A Pop-Up box should appear on your Internet Browser with columns you will receive in your Export. AusCycling Member Services Team **recommends** the below fields to be ticked for your report:

Heading – 'Default':

- ID Number
- Email
- Phone
- First Name
- Last Name
- Gender
- Date of Birth
- Address (State)
- Emergency Contact
- Emergency Contact Number

Note:
This report is only for Current/Active Members of your Club.
There will be further documents to assist with other reports.

Heading – 'Membership':

- Membership Level
- Subscription Status
- Subscription Start Date
- Subscription End Date
- Subscription Variations

Heading – 'Shared Custom':

- Suspension Start Date
- Suspension End Date
- Suspension Reason

On the next page, we have provided a screenshot for you to mirror the 'Displayed Fields' for your report.

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7. (Continued) – For the screenshot of the 'Displayed Fields, please see below:

Screenshot 1:

Displayed Attributes

Default

- ☐ Contact
- ☐ Created
- ☑ ID Number
- ☑ Email
- ☑ Phone
- ☐ Work phone
- ☐ Home phone
- ☐ Business phone
- ☐ Direct phone

- ☐ Private phone
- ☐ Mobile phone
- ☐ Fax phone
- ☐ Pager phone
- ☐ Skype phone
- ☐ Other phone
- ☐ Shared
- ☐ Other groups
- ☐ Company

- ☑ First Name
- ☑ Last Name
- ☐ Nickname
- ☑ Gender
- ☑ Date of Birth
- ☐ Address (Street)
- ☐ Address (City)
- ☑ Address (State)

- ☐ Address (Postcode)
- ☐ Address (Country)
- ☐ Occupation
- ☑ Emergency Contact
- ☑ Emergency Contact Number
- ☐ Member Since
- ☐ Unsubscribed?
- ☐ Amount Owed

Card

- ☐ Card Type
- ☐ Card Expiry

- ☐ Card Ending in
- ☐ Card Payment Gateway

- ☐ Card Status

- ☐ Card Added to Profile

Membership

- ☑ Membership Level
- ☐ Membership Status
- ☐ Membership ID
- ☐ Membership ID Reference

- ☐ Membership Start Date
- ☐ Membership End Date
- ☐ Membership Auto-renew Status
- ☐ Subscription ID

- ☑ Subscription Status
- ☑ Subscription Start Date
- ☑ Subscription End Date

- ☐ Subscription Is Renewal?
- ☐ Subscription Is Latest?
- ☑ Subscription Variations

Shared Custom (AusCycling Test Club)

- ☐ ACE Administrator
- ☐ AUDAX Number

- ☐ Grading - Road (Legacy, to be removed)
- ☐ Grading - Track (Legacy

- ☑ Suspension End Date
- ☑ Suspension Reason

- ☐ Coach Accreditation Level
- ☐ Coach Accreditation

Screenshot 2:

- ☐ CA Commissaire Accreditation Certificate
- ☐ Para-Cycling Classification

- ☐ Address
- ☐ Parent/Guardian's Mobile Number
- ☐ Parent/Guardian's consent confirmation
- ☐ Do you have a referral code?
- ☑ Suspension Start Date

- ☐ Transponder ID #1
- ☐ Transponder ID #2
- ☐ Transponder ID #3
- ☐ Do you hold a current coach or official accreditation with BMXA or MTBA?

- ☐ SIA Clean Sport 101 Completion
- ☐ SIA Clean Sport 101 (file)
- ☐ How did you hear about us?
- ☐ How did you hear about our 4 Week Free Trial?
- ☐ How did you hear about our Non-Riding Membership?

Reset to Default   Cancel   Apply

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8. Once you have selected the '**Displayed Fields**' from the previous screenshots. Click '**Apply**' at the bottom of the pop-up box. This will now refresh and add the '**Displayed Fields**' as columns and are ready to be exported.

9. To export, click on '**Actions**' and select '**Export All**'. Please see the below screenshot:
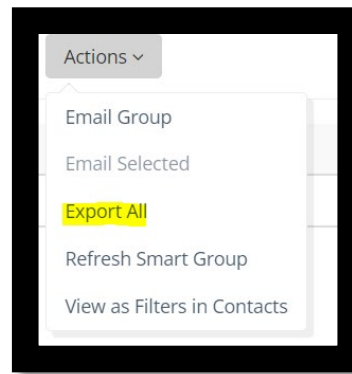
10. A message will then appear shortly after clicking on '**Export All**' which says:
"Your CSV is being generated and will be emailed to *INSERT YOUR EMAIL*. This can take up to an hour." Note: In most cases, it does arrive in your email inbox in timely manner.
HOT TIP:
To reduce the number of times of selecting the 'Displayed Fields'. Go to the URL (Website Link) located on your Internet Browser and save this as a 'Favourite'. You will then only need to do **HOT TIP on Step 5** each time you wish to request this report.
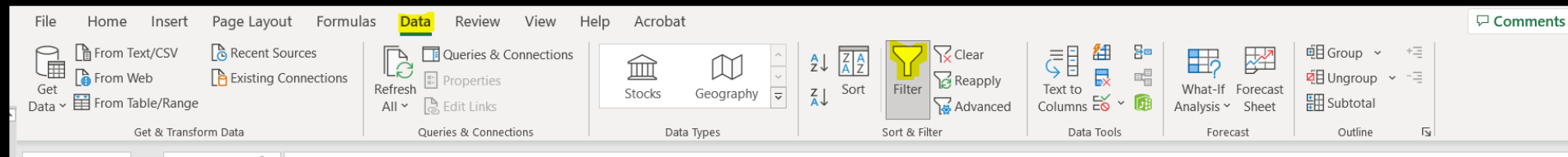
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11. Your CSV file will arrive in your Email Inbox. You can download this in two ways, either by clicking on '**Download File**' or copying the URL link into your Internet Browser.

12. Once you have downloaded this, it will appear in your downloads on your device, and you can click on the file, and it will open the CSV file into Microsoft Excel.

13. Go to the column that says '**Subscription Variations**' and filter by typing in your Club's exact name. This is to ensure this report is only members of your Club.
This will have Primary memberships of your Club and members who have Club Add-Ons within your club. If you wish to remove Club Add-On members from this report, you can filter this by going to '**Membership Level**'.

If you are unsure how to filter your report, you can follow the below steps:
1. Select the column(s) you wish to filter.
2. Go to the heading '**Data**' and select '**Filter**'. Screenshot below:

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14. You now have a Current/Active Members Report. We suggest saving this as a Microsoft Excel Spreadsheet (not as a CSV file) when you select the file type.
AusCycling Member Services Team suggests you save this as:

Current Members Report – as of YYYY-MM-DD

Example:
Current Members Report – as of 2022-06-24

Please ensure this is saved safely within your Club's records, as this is personal information of members of AusCycling and your Club.

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Questions/Feedback on your Report

We hope this guide has helped your Club with assisting with providing a report of active members within your club.

If you have questions or feedback on this guide/report, please contact the AusCycling Member Services Team - membership@auscycling.org.au

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